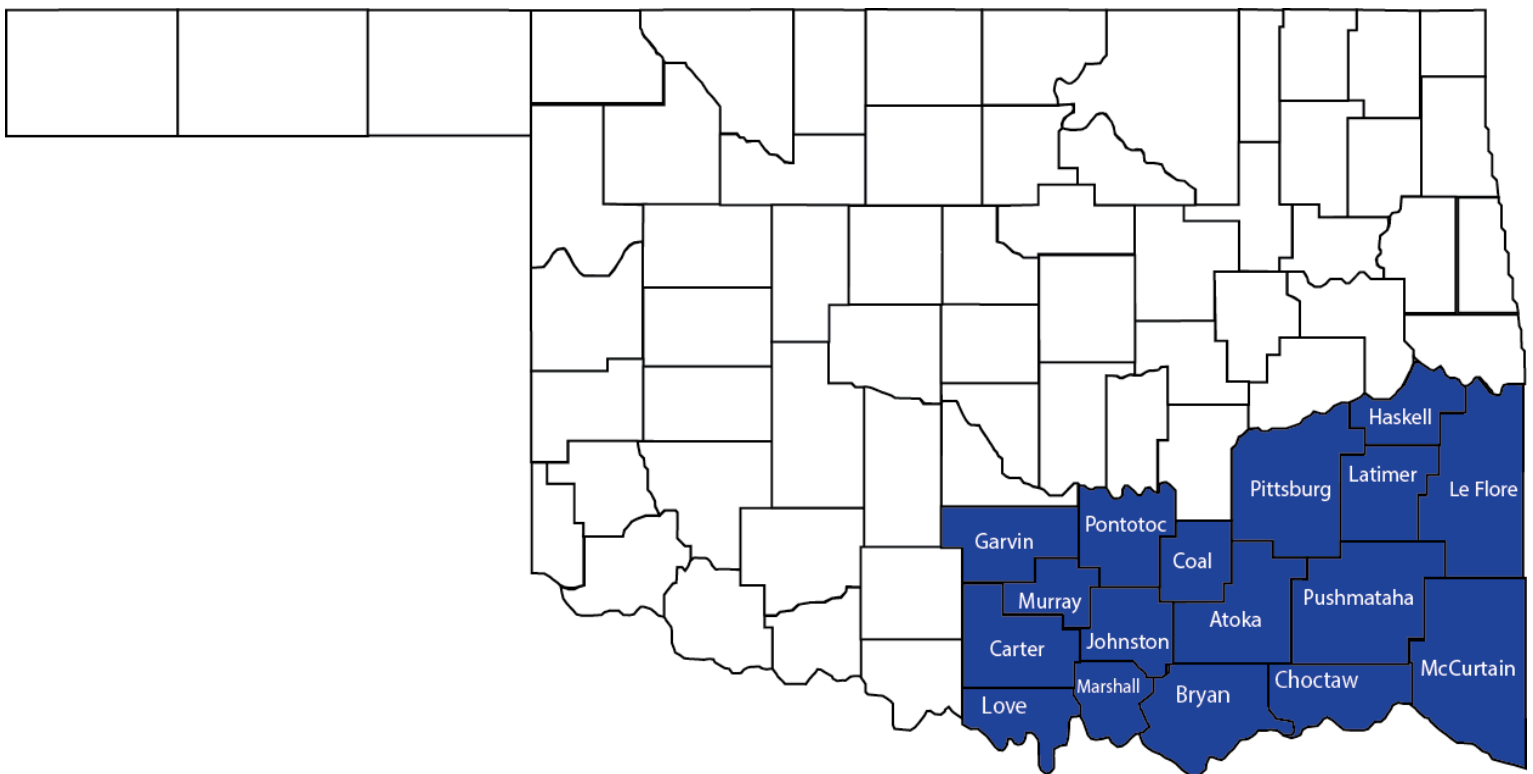


Southeast Oklahoma Planning Region

April 2016

Overview and Purpose

The Workforce Innovation and Opportunity Act (WIOA) represents a commitment to workforce development for individual and national economic growth. WIOA seeks to increase opportunities for individuals, especially those facing barriers to employment, and invests in the imperative connection between education and the career preparation. Planning regions have been created based on state labor market areas, regional economic development areas, and funding mechanisms for educational centers including colleges, universities, and CareerTechs. One primary purpose of the planning regions is to foster necessary partnerships that reduce costs and meet training needs of Oklahoma's workforce. Planning regions allow to more effectively prioritize training for in-demand occupations unique to the area, while streamlining efficiency. The Southeast Oklahoma Planning Region is comprised of seventeen counties: Atoka, Bryan, Carter, Choctaw, Coal, Garvin, Haskell, Johnston, Latimer, Le Flore, Love, Marshall, McCurtain, Murray, Pittsburg, Pontotoc, and Pushmataha.

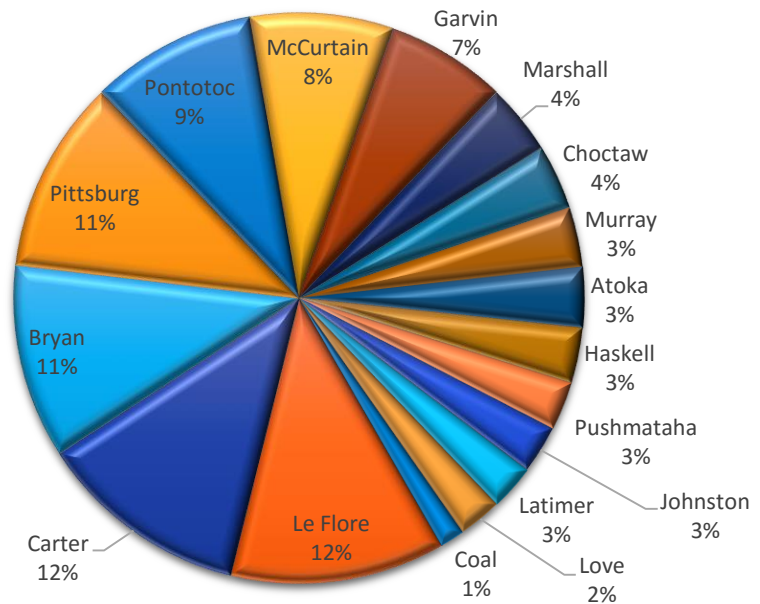


Population of the Southeast Oklahoma Planning Region

The Southeast Planning Region counties combine for an estimated population of 406,750. This accounts for 10% of the total state population. Ardmore is the largest city in the region with an estimated population of 25,225.

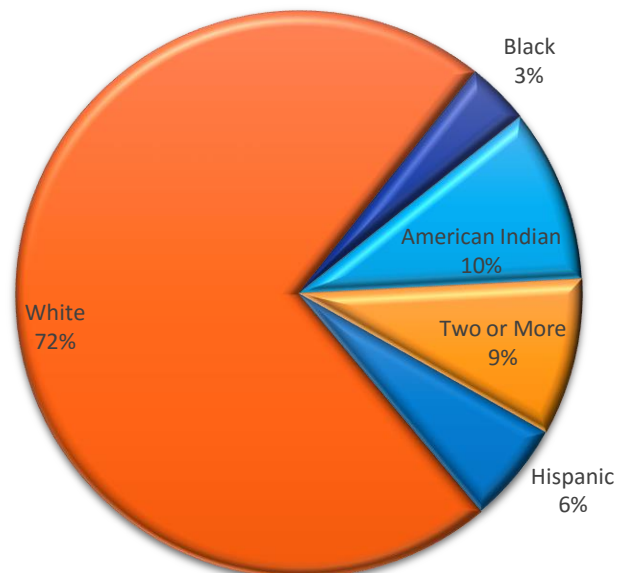
- According to 2015 Census estimates, Le Flore County is the most populous county in the region with an estimated population of 49,600. Carter County is a close second with 48,700 people.
- Coal County is the least populated county in the region, with an estimated population of 5,650.
- Since 2010, the region has experienced varied population growth. Nine of the counties in the region experienced population increase, led by Bryan County at 5.8%. Eight counties experienced population decline, with Latimer losing the most at -6%.
- Four counties in the area (Garvin, Haskell, Johnston, and McCurtain) experienced a change of +/- one percent.

Population of the Southeast Oklahoma Planning Region



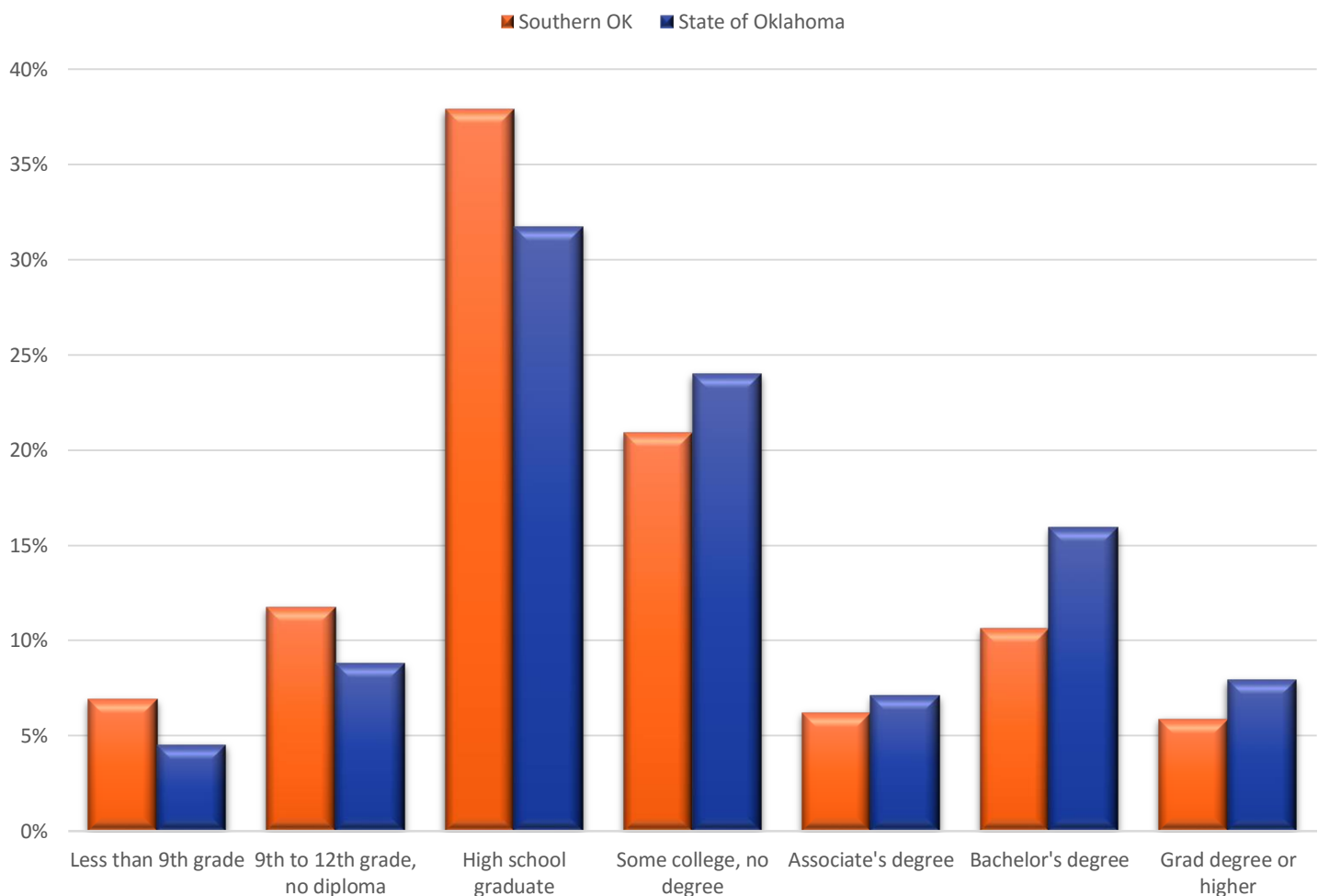
Southeast Oklahoma Planning Region Population Breakdown by Race:

- 71.4% of residents in the Southeast Oklahoma Planning Region identify themselves as White. This is more than the statewide average of 68%.
- With 39,730 people, Native American is the second most populous group in Southeast Oklahoma. They account for 10% of the population.
- Two or More Races consist of 9% of the population. Black makes up 3% of the population, while all remaining races account for one percent or less of the population.
- Hispanics, which are categorized as an ethnicity by the Census bureau, make up 5.7% of the total population in Southeast Oklahoma.



Educational Attainment in the Southeast Oklahoma Planning Region:

- 81.4% of people residing in the Southeast Oklahoma Planning Region have attained at least a high school degree. This is well below the statewide average of 86.6%.
- The region has educational attainment levels below the state averages in every category.
- Bachelor's is the largest gap of post-secondary educational attainment between region and state averages, at 5.3%. The smallest gap between regional and state averages is the associate's degree earners, with a gap of 0.9%.
- At the secondary level, the Southeast Oklahoma Planning Region has higher percentage of individuals at each level, with the largest gap occurring in the high school graduate category. In the Southeast Oklahoma Planning Region, 56.1% of people over the age of 25 have a high school diploma or less, compared to 45% for the state.

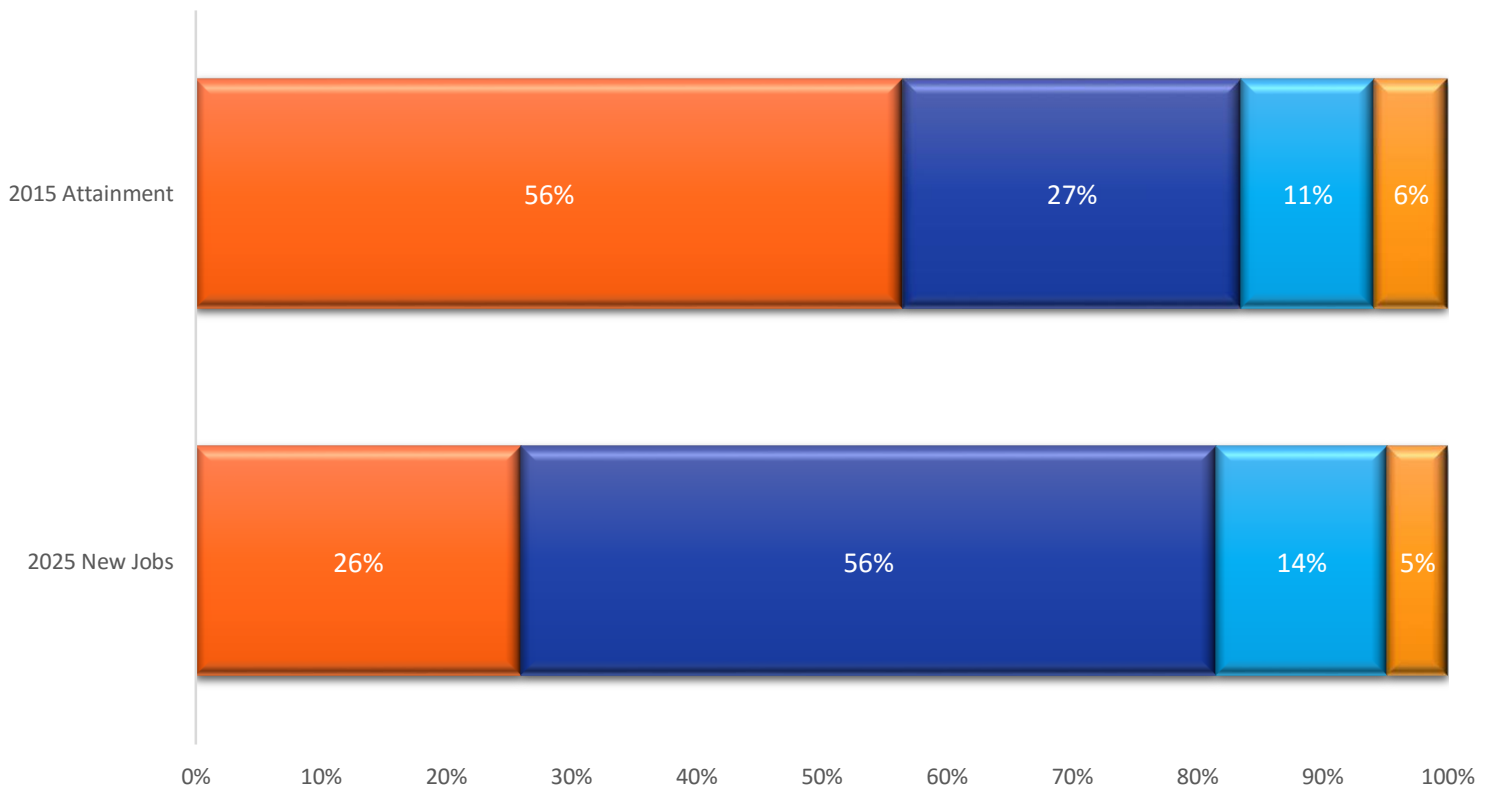


Southeast Oklahoma Planning Region Education Gap

- By 2025, 26% of all new jobs in the Southeast Oklahoma Planning Region will require a high school degree or less, but 56% will require post-secondary training. Currently only 27% of individuals in the area have some post-secondary training or an associate's degree. By 2025, 14% of new jobs will require a bachelor's degree, and 5% will require a graduate degree or higher.
- Based on the projected demand and current educational attainment levels, the Southeast Oklahoma Planning Region has a significant gap in the post-secondary/associate's degree/certificate level if they want to be able to meet the needs that may emerge in the area.
- There is always opportunity to encourage further education, especially considering the gap in the post-secondary training and those with a high school diploma, or less. That segment of the population could be targeted to become candidates for further education or attaining certificates. Decreasing the number of individuals with high school or less, and increasing numbers of trained post-secondary individuals will lead to better jobs and potential to create wealth.
- There is a slight surplus of individuals in the grad degree or higher category compared with new job requirements for that sector in 2025.

Southeast Oklahoma Planning Region Education Gap for Jobs by 2025

■ High School and Less ■ Associates/Certificate/Credential ■ Bachelors ■ Graduate



Source: OK Office of Workforce Development; EMSI 2016.1
2025 Estimates based on new jobs created and entry level job requirements

Southeast Oklahoma Region Educational Assets

Colleges, Universities, and Career Techs are vital in developing the workforce of Southeast Oklahoma. The region is home to several educational institutions that help develop the region's workforce. These institutions help supply organizations and companies with the labor and skills necessary for today's economy. Colleges, Universities, and Career Techs can work with employers in Southeast Oklahoma to find gaps in employee skills. With Health Care and Social Services and Manufacturing as two significant industries, the institutions should be able to provide adequate training for the workforce to succeed.

Career Techs

There are three Career Techs in the Southeast Oklahoma Region area with thirteen locations:

- **Kiamichi Technology Center** (Antlers, Atoka, Durant, Hugo, Idabel, McAlester, Poteau, Spiro, Stigler, Talihina, Wilburton)
- **Pontotoc Technology Center** (Ada)
- **Southern Oklahoma Technology Center** (Ardmore)

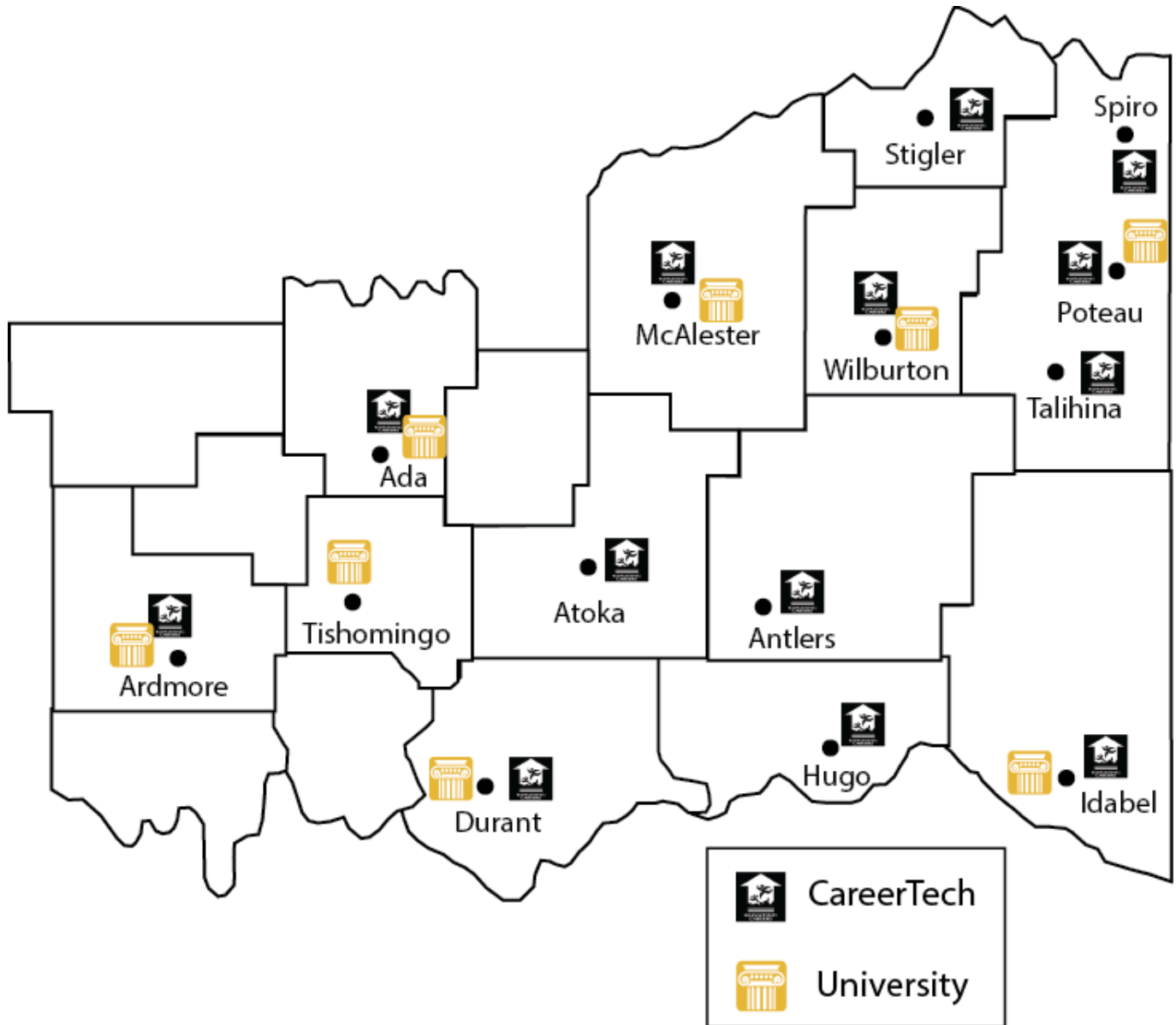
Colleges and Universities

Source: Oklahoma Career Tech

There are eight colleges and universities in the region:

- **Carl Albert State College** (Poteau)
- **East Central University** (Ada)
- **Eastern Oklahoma State College** (McAlester, Wilburton)
- **Murray State College** (Tishomingo)
- **Southeastern Oklahoma State University** (Durant, Idabel)
- **University Center of Southern Oklahoma** (Ardmore)

Source: Oklahoma State Regents for Higher Education

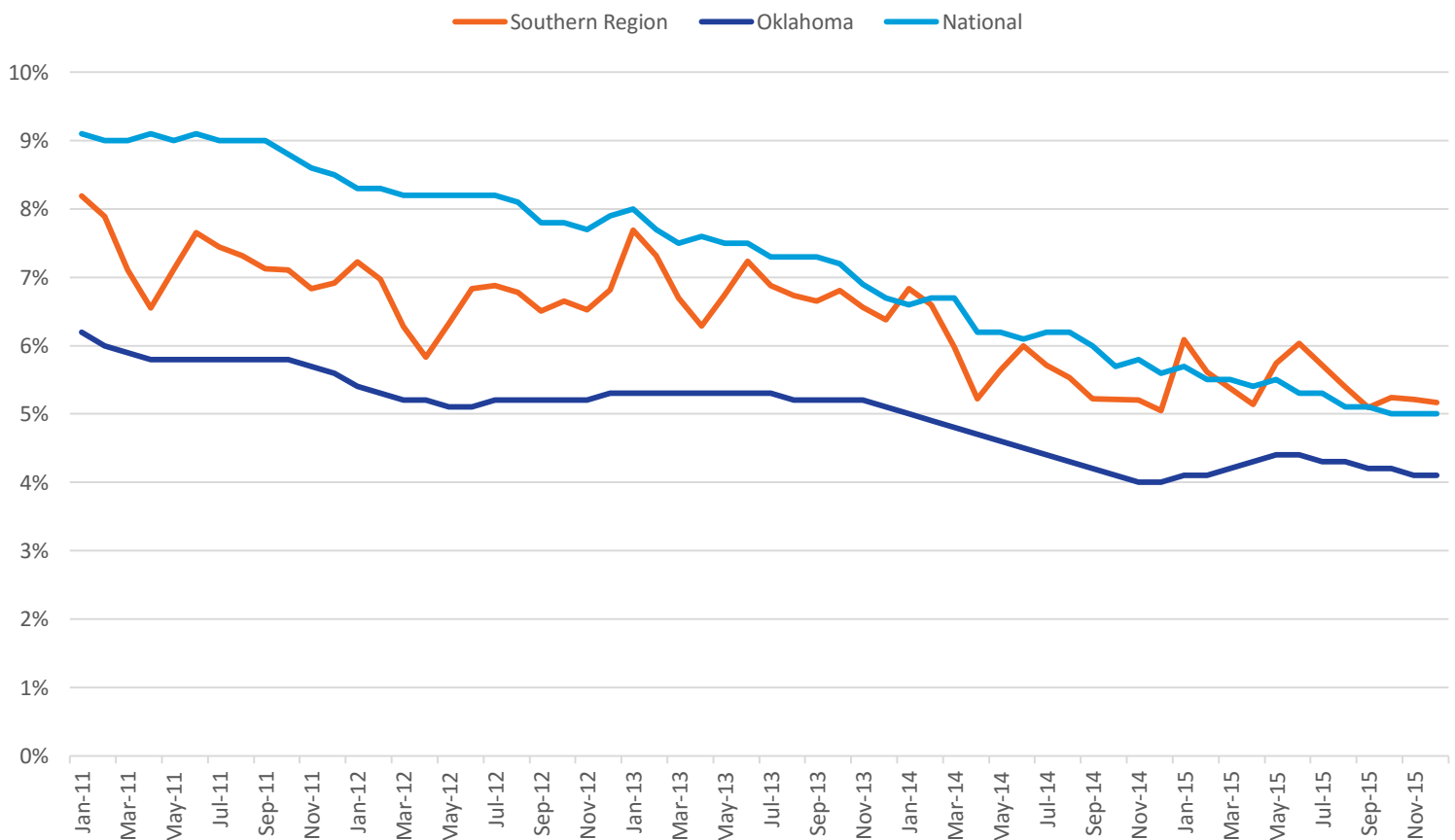


Economic Data

Unemployment Rate:

- Since January 2011, the Southeast Oklahoma Planning Region has remained above the state unemployment rate, and until January 2014, below the national unemployment rate. After reaching a peak of 8.2% in January 2011, the Southeast Oklahoma Planning Region unemployment rate has declined – although rose in 2013. In December 2015 the unemployment rate was 5%.
- The Southeast Oklahoma unemployment rate has been higher than the state average since January 2011. The Southeast unemployment rate remained below the national average for two years, but since January 2014, it has been at or above the national average.
- The Southeast unemployment rate and the State have maintained a gradual declining trend in unemployment rates since peaking in January 2011.
- The Southeast Oklahoma Planning region has unemployment rates greater than the national average. This is the only area in the state where that is true. The area has seen a gradual decline over the 5 year period, however, there are some counties where the unemployment rate is still very high. This can cause strain on public services when too many people are unemployed.

Five Year Unemployment Rate - Southeast Region, State, and National

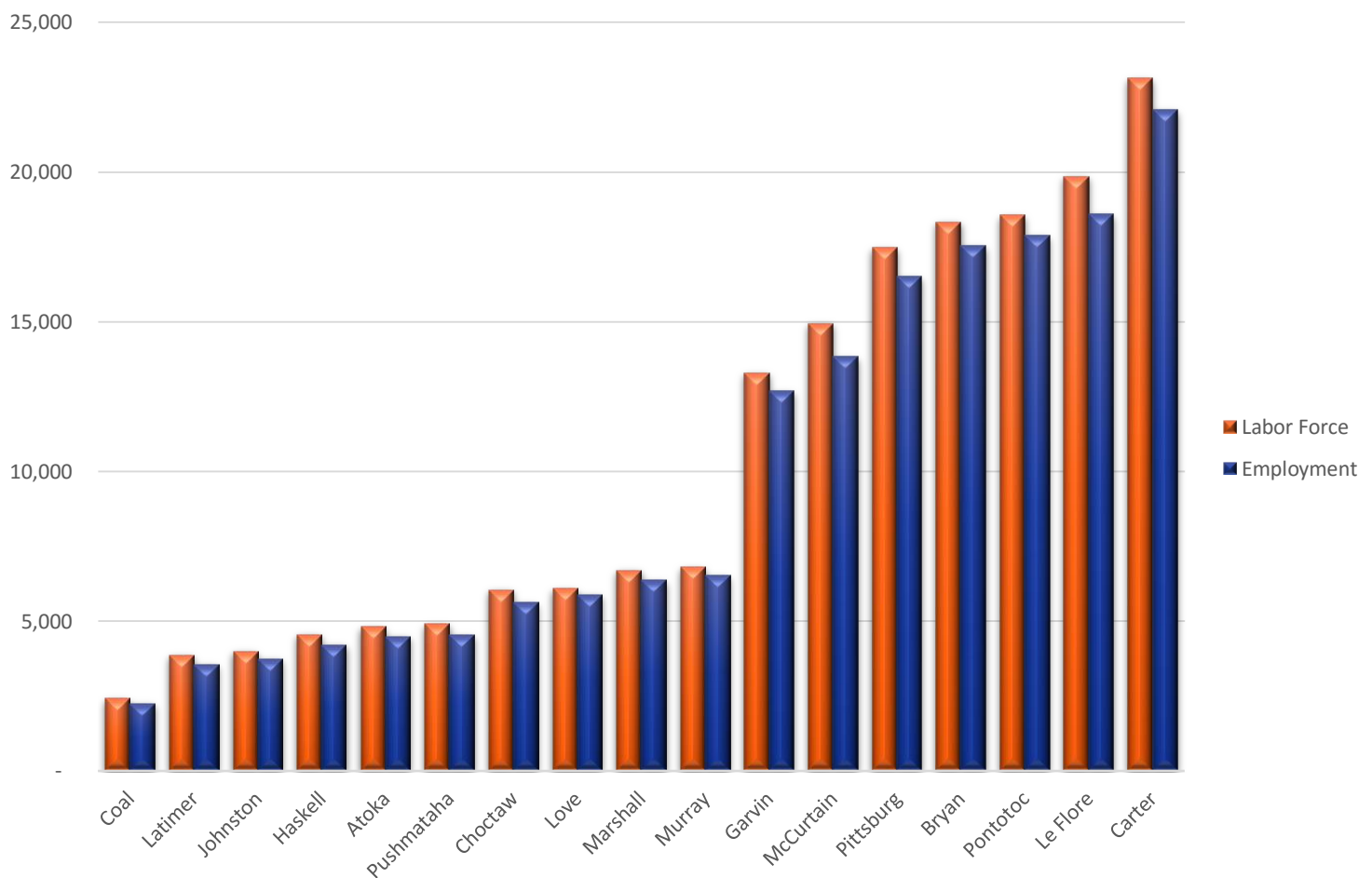


Source: Bureau of Labor Statistics, Local Area Unemployment Statistics

Total Employment:

- As of January 2016 there are 175,610 people in the Southeast Oklahoma Planning Region in the labor force, and 166,190 are employed. That equates to 94.6% of the labor force in the region is employed.
- Carter County possesses the second largest population in the region, but has the largest labor force and largest number of people employed in the region. Le Flore County, which possesses the largest population in the region has the second largest labor force and number employed.
- With the exception of Le Flore and McCurtain counties, the larger counties tend to have lower unemployment rates than the smaller counties.

Total Employment by County in Southeast Oklahoma Region January 2016



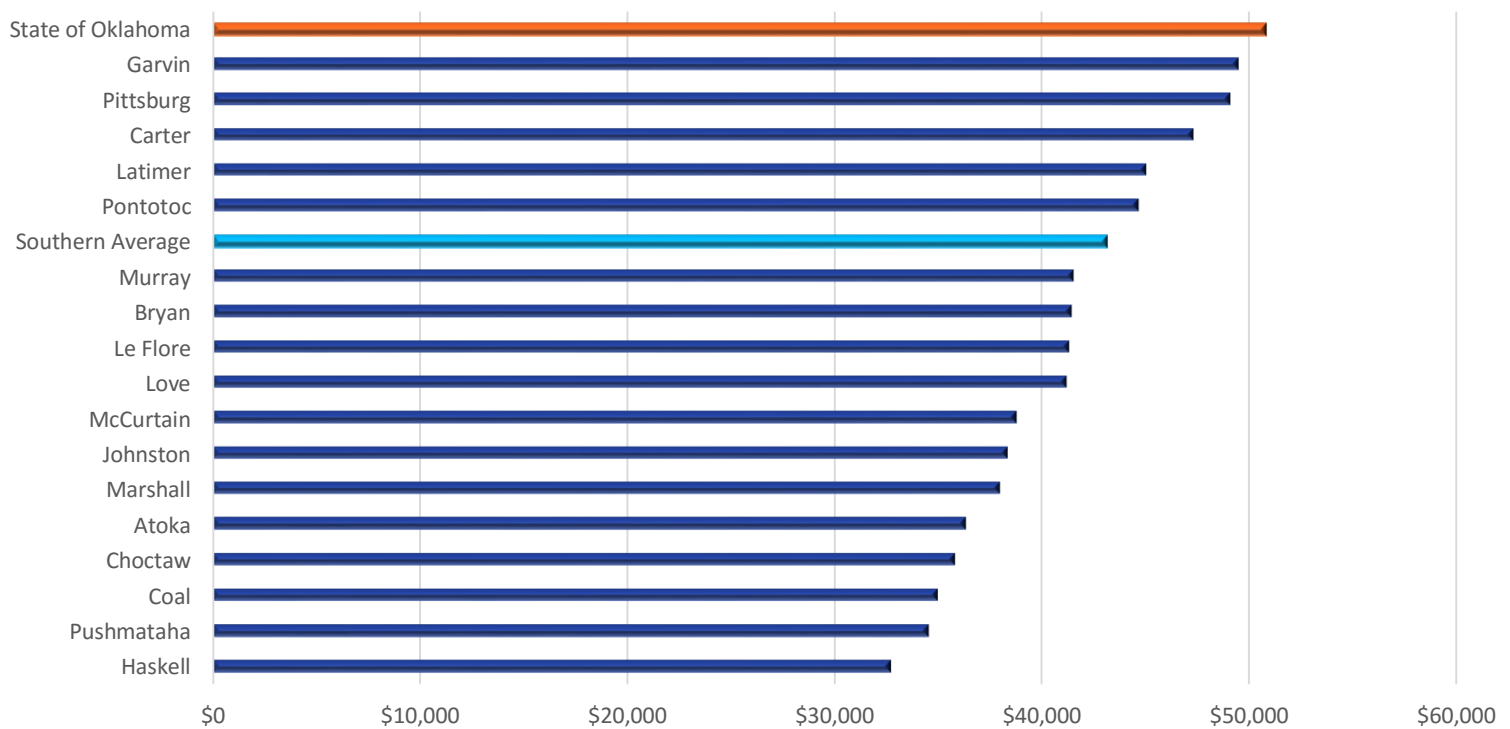
Source: BLS; LAUS

Top Industries in Southeast Oklahoma

Industry
Government
Health Care and Social Assistance
Retail Trade
Manufacturing
Accommodation and Food Services
Construction
Other Services (except Public Administration)
Transportation and Warehousing
Mining, Quarrying, and Oil and Gas Extraction
Professional, Scientific, and Technical Services

Wages by County:

- The Southeast Oklahoma Planning Region average wage is \$43,125; this is below the state average of \$50,825 by about \$7,700. The gap between the Southeast Oklahoma Planning Region counties and the state average ranges from \$1,325 less in Garvin County to \$18,150 less in Haskell County.
- Garvin County has the highest wages in the region, higher than the region average but below the state average by about \$1,300.
- All of the counties in the region have average wages below the state average.

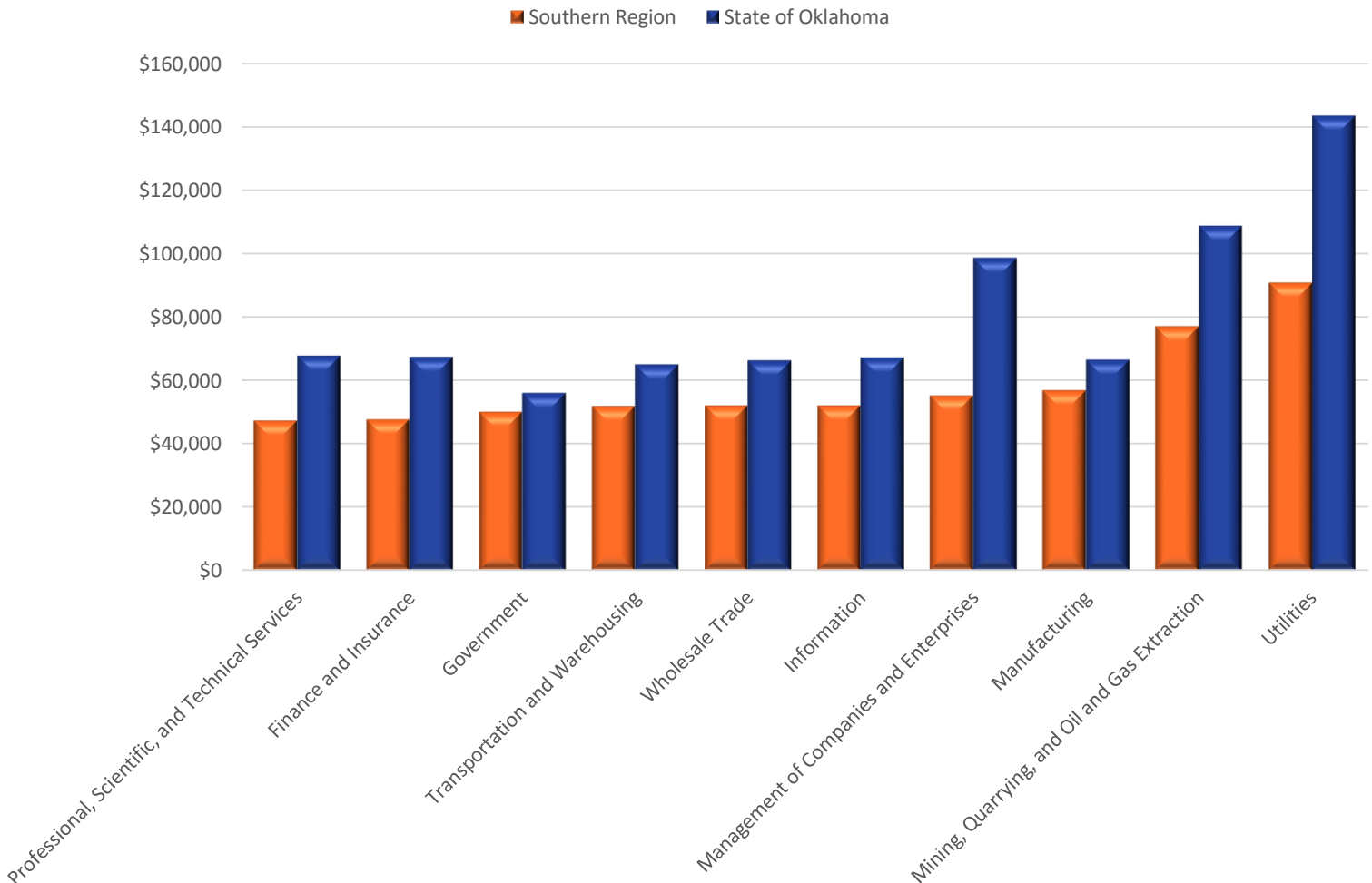


Source: EMSI 2016.1

Wages by Industry:

- All of the top Industry earnings in the Oklahoma are higher than Southeast Planning Region averages. The largest wage difference occurs in the “Utilities” industry. Statewide this position earns \$52,700 more than in Southeast Oklahoma.
- The industries in Southeast Oklahoma that compare closest to state averages are, “Government” and “Manufacturing”
- “Professional Services”, “Financial Service’s”, and “Government” are three industries that earn less than the state of Oklahoma’s yearly average earnings of \$50,825.

Average Earnings by Top Industry in Southeast Region and Oklahoma



Source: EMSI 2016.1

Ecosystems Impact in Southeast Oklahoma on Occupations and Salaries

The Oklahoma Department of Commerce identified five ecosystems in Oklahoma important to the economy to generate wealth, have employment growth potential, or where the state has a competitive advantage (Aerospace and Defense, Energy, Agriculture and Bioscience, Information and Financial Services, and Transportation and Distribution). In each ecosystem, there are critical occupations necessary for future growth and advancement. In addition to the five statewide ecosystems, there are ecosystems at the regional level important for regional economies.

Aerospace & Defense

Based on 2015 job numbers there are 4,080 jobs in the Aerospace & Defense Ecosystem in Southeast Oklahoma with average earnings of approximately \$47,360.

As a projection of demand by 2025, total employment in the Aerospace and Defense ecosystem will increase to 4,390 jobs in Southeast Oklahoma, an increase of 310 jobs for the region.

The list below encompasses some of the critical occupations for the Aerospace and Defense ecosystem in Southeast Oklahoma. However, these occupations are not solely intended to serve the Aerospace and Defense ecosystem, they are driven by demand and individuals with these work backgrounds will have transferable skills to other ecosystems.

SOC	Industry	Median Hourly Earnings	Education Level
55-9999	Military occupations	\$17.04	N/A
51-4121	Welders, Cutters, Solderers, and Brazers	\$15.47	Moderate-term on-the-job training
49-9041	Industrial Machinery Mechanics	\$22.39	Long-term on-the-job training
51-4041	Machinists	\$17.62	Long-term on-the-job training
49-9071	Maintenance and Repair Workers, General	\$13.62	Long-term on-the-job training
11-1021	General and Operations Managers	\$34.39	Bachelor's degree
51-2022	Electrical and Electronic Equipment Assemblers	\$16.56	Short-term on-the-job training
17-2011	Aerospace Engineers	\$44.32	Bachelor's degree
49-9021	Heating, Air Conditioning, and Refrigeration Mechanics and Installers	\$16.35	Postsecondary non-degree award
17-3023	Electrical and Electronics Engineering Technicians	\$28.30	Associate's degree

Source: EMSI 2016.1

As previously mentioned, the critical occupations above are necessary for the Aerospace & Defense ecosystem to thrive. Just as important, these critical occupations are necessary for other industries as well. Other industries that demand these occupations include: Federal Government, support activities for oil and gas extraction, truck trailer manufacturing and machine shops, among others in Southeast Oklahoma.

Energy

Based on 2015 job numbers there are 9,355 jobs in the Energy Ecosystem in Southeast Oklahoma with average earnings of \$81,740.

As a projection of demand, by 2025 total employment in the Energy ecosystem will grow to 11,200 jobs in Southeast Oklahoma, an addition of 1,845 jobs for the region.

The list below encompasses some of the critical occupations for the Energy ecosystem in Southeast Oklahoma. However, these occupations are not solely intended to serve the Energy ecosystem, they are driven by demand and individuals with these work backgrounds will have transferable skills to other ecosystems.

SOC	Industry	Median Hourly Earnings	Education Level
53-3032	Heavy and Tractor-Trailer Truck Drivers	\$17.37	Postsecondary non-degree award
47-5071	Roustabouts, Oil and Gas	\$19.02	Moderate-term on-the-job training
47-5012	Rotary Drill Operators, Oil and Gas	\$18.17	Moderate-term on-the-job training
47-5013	Service Unit Operators, Oil, Gas, and Mining	\$21.87	Moderate-term on-the-job training
47-2061	Construction Laborers	\$11.86	Short-term on-the-job training
51-4121	Welders, Cutters, Solderers, and Brazers	\$15.47	Moderate-term on-the-job training
47-5011	Derrick Operators, Oil and Gas	\$24.64	Short-term on-the-job training
47-2073	Operating Engineers and Other Construction Equipment Operators	\$17.38	Moderate-term on-the-job training
17-2171	Petroleum Engineers	\$61.91	Bachelor's degree
49-9051	Electrical Power-Line Installers and Repairers	\$25.08	Long-term on-the-job training

Source: EMSI 2016.1

As previously mentioned, these occupations are necessary for the Energy ecosystem to thrive. Just as important, they are necessary for other industries as well. Other industries that demand these occupations include crude oil extraction, construction, general freight trucking, and support activities for oil & gas extraction.

Agriculture & Bioscience

Based on 2015 job numbers there are 8,830 jobs in the Agriculture & Bioscience ecosystem in Southeast Oklahoma with average earnings of \$42,040.

As a projection of demand, by 2025 total employment in the Agriculture and Bioscience ecosystem will decrease to 8,080 jobs in Southeast Oklahoma, a loss of 750 jobs for the region.

The list below encompasses some of the critical occupations for the Agriculture and Bioscience ecosystem in Southeast Oklahoma. However, these occupations are not solely intended to serve the Agriculture and Bioscience ecosystem, they are driven by demand and individuals with these work backgrounds will have transferable skills to other ecosystems.

SOC	Industry	Median Hourly Earnings	Education Level
51-3023	Slaughterers and Meat Packers	\$10.24	Short-term on-the-job training
45-2092	Farmworkers and Laborers, Crop, Nursery, and Greenhouse	\$12.56	Short-term on-the-job training
11-9013	Farmers, Ranchers, and Other Agricultural Managers	\$12.31	None
51-3022	Meat, Poultry, and Fish Cutters and Trimmers	\$11.45	Short-term on-the-job training
45-4022	Logging Equipment Operators	\$16.23	Moderate-term on-the-job training
53-3032	Heavy and Tractor-Trailer Truck Drivers	\$17.37	Postsecondary non-degree award
53-7051	Industrial Truck and Tractor Operators	\$15.08	Short-term on-the-job training
51-1011	First-Line Supervisors of Production and Operating Workers	\$22.28	Postsecondary non-degree award
41-4012	Sales Representatives, Wholesale and Manufacturing, Except Technical and Scientific Products	\$20.97	Moderate-term on-the-job training
31-9096	Veterinary Assistants and Laboratory Animal Caretakers	\$12.18	Short-term on-the-job training

Source: EMSI 2016.1

As previously mentioned, these occupations are necessary for the Agriculture & Bioscience ecosystem to thrive. Just as important, they are necessary for other industries as well. Other industries that demand these occupations include animal production, general freight trucking, and farm labor and crop production, among others in Southeast Oklahoma.

Information & Financial Services

Based on 2015 job numbers there are 5,620 jobs in the Information & Financial Services ecosystem in Southeast Oklahoma with average wages of \$50,820.

As a projection of demand, by 2025 total employment in the Information and Financial Services ecosystem will increase to 6,210 jobs in Southeast Oklahoma, an increase of 590 jobs for the region.

The list below encompasses some of the critical occupations for the Information and Financial Services ecosystem in Southeast Oklahoma. However, these occupations are not solely intended to serve the Information and Financial Services ecosystem, they are driven by demand and individuals with these work backgrounds will have transferable skills to other ecosystems.

SOC	Industry	Median Hourly Earnings	Education Level
43-3071	Tellers	\$10.61	Short-term on-the-job training
13-2011	Accountants and Auditors	\$22.39	Bachelor's degree
43-3031	Bookkeeping, Accounting, and Auditing Clerks	\$13.99	Moderate-term on-the-job training
13-2072	Loan Officers	\$24.78	Bachelor's degree
43-4131	Loan Interviewers and Clerks	\$13.26	Short-term on-the-job training
43-4051	Customer Service Representatives	\$11.76	Short-term on-the-job training
11-3031	Financial Managers	\$30.61	Bachelor's degree
11-1021	General and Operations Managers	\$34.39	Bachelor's degree
49-2022	Telecommunications Equipment Installers and Repairers, Except Line Installers	\$17.94	Postsecondary non-degree award
41-3031	Securities, Commodities, and Financial Services Sales Agents	\$30.99	Bachelor's degree

Source: EMSI 2016.1

As previously mentioned, these occupations are necessary for the Information & Financial Services ecosystem to thrive. Just as important, they are necessary for other industries as well. Other industries that demand these occupations include commercial banking, consumer lending, law offices, and accounting services, among others.

Transportation & Distribution

Based on 2015 job numbers there are 13,760 jobs in the Transportation & Distribution ecosystem in the Southeast Oklahoma Planning Region with average earnings of \$53,040.

As a projection of demand, by 2025 total employment in the Transportation and Distribution ecosystem will increase to 15,180, a gain of 1,420 jobs for the region.

The list below encompasses some of the critical occupations for the Transportation and Distribution ecosystem in Southeast Oklahoma. However, these occupations are not solely intended to serve the Transportation and Distribution ecosystem, they are driven by demand and individuals with these work backgrounds will have transferable skills to other ecosystems.

SOC	Industry	Median Hourly Earnings	Education Level
53-3032	Heavy and Tractor-Trailer Truck Drivers	\$17.37	Postsecondary non-degree award
51-9041	Extruding, Forming, Pressing, and Compacting Machine Setters, Operators, and Tenders	\$18.10	Moderate-term on-the-job training
53-7051	Industrial Truck and Tractor Operators	\$15.08	Short-term on-the-job training
51-2092	Team Assemblers	\$13.43	Moderate-term on-the-job training
51-4121	Welders, Cutters, Solderers, and Brazers	\$15.47	Moderate-term on-the-job training
43-5071	Shipping, Receiving, and Traffic Clerks	\$13.56	Short-term on-the-job training
11-1021	General and Operations Managers	\$34.39	Bachelor's degree
53-3033	Light Truck or Delivery Services Drivers	\$12.14	Short-term on-the-job training
53-7063	Machine Feeders and Offbearers	\$19.01	Short-term on-the-job training
51-9197	Tire Builders	\$21.07	Moderate-term on-the-job training

Source: EMSI 2016.1

As previously mentioned, these occupations are necessary for the Transportation & Distribution ecosystem to thrive. Just as important, they are necessary for other industries as well. Other industries that demand these occupations include general freight trucking, manufacturing, and general warehouse and storage, among others in the region.

Health Care (Regional Complementary)

Based on 2015 job numbers there are 22,230 jobs in the Health Care ecosystem in the Southeast Oklahoma Planning Region with average wages of \$42,380.

As a projection of demand, by 2025 total employment in the Health Care ecosystem will grow to 28,030 jobs in Southeast Oklahoma, an increase of 5,800 jobs for the region.

The list below encompasses some of the critical occupations for the Health Care ecosystem in Southeast Oklahoma. However, these occupations are not solely intended to serve the Health Care ecosystem, they are driven by demand and individuals with these work backgrounds will have transferable skills to other ecosystems.

SOC	Industry	Median Hourly Earnings	Education Level
29-1141	Registered Nurses	\$26.74	Associate's degree
31-1014	Nursing Assistants	\$10.21	Postsecondary non-degree award
39-9021	Personal Care Aides	\$9.13	Short-term on-the-job training
29-2061	Licensed Practical and Licensed Vocational Nurses	\$17.78	Postsecondary non-degree award
31-1011	Home Health Aides	\$9.60	Short-term on-the-job training
43-6013	Medical Secretaries	\$11.92	Moderate-term on-the-job training
31-9092	Medical Assistants	\$12.66	Postsecondary non-degree award
29-2052	Pharmacy Technicians	\$11.98	Moderate-term on-the-job training
11-9111	Medical and Health Services Managers	\$32.82	Bachelor's degree
21-1093	Social and Human Service Assistants	\$10.72	Short-term on-the-job training

Source: EMSI 2016.1

As previously mentioned, these occupations are necessary for the Health Care ecosystem to thrive. Just as important, they are necessary for other industries as well. Other industries that demand these occupations include general and medical hospitals, physician's offices, nursing care facilities, and home health care services, among others.